

SHAREPOINT 2010 PREPAREDNESS: BUSINESS STAKEHOLDERS

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AGENDA

- The Business Case
 - What's New – Key Features
 - What's Not (since SharePoint 2007)
 - Server and Client System Requirements
 - Key Considerations around Upgrading
 - Licensing
 - Moving forward: Plan of attack
 - Q&A
-
- Australia SharePoint Conference Update
 - SharePoint Designer 2010 Unleashed Book Update

BUT FIRST...

- Trivia...
- Today's most important piece of news on Facebook
 - “My belly button is now lint free. I feel better.”
- Social networking
 - We can make choices!

WHY: BUSINESS STAKEHOLDERS?

- Why should I deploy SharePoint 2010?
 - Who is/are the business stakeholder/s?
 - CIO
 - CTO
 - IT Manager
 - Developer
 - Chief Geek
 - Finance Manager
 - Designer
 - End User
- What type of business case will you put forward?
 - Technical
 - Business

NO. 1 ANNOYANCE WHEN SELLING

Incorrect targeting

- Says geek to CTO/Business stakeholder “...IT can do all these weird and wonderful things”
- ...(The Geek can't wait to show off all the fancy new features which will 'impress' the business stakeholder)
-(The Geek launches into detailed demonstration of how XYZ works, completely bypassing any related 'business' benefits)
- Says stakeholder to geek “but I still don't understand how it's going to benefit my business – where are my cost savings?”
- The Geek seems confused, “but I just showed you how it works, what more do you need?”
- CTO/Business stakeholder, “but where are the real business benefits? **What will IT do that my current system does not do?**” ...

HOLD THAT THOUGHT!

- **What will IT do that my current system does not do?**

WHY: BUSINESS SECTOR?

When planning one size doesn't fit all!

- Multiple features, multiple purposes, multiple opportunities
- What type of company or business are you selling to?
 - Health
 - Fast access to online data
 - Online Forms (usable data entry forms)
 - Integration with patient management systems
 - Finance
 - Data retrieval and data input from/to external databases
 - Business Intelligence features
 - Excel Services – access to online, shared Excel workbooks, pivot tables, LARGE amounts of data
 - Dashboards and mash-ups
 - Marketing
 - Social interaction features
 - Storage and access to images and media files
 - Larger storage capacity!
 - Government
 - Require external sites to be W3C standards compliant

CONSISTENT REQUIREMENTS

- Irrespective of business types:
 - Search
 - Navigation
 - Look and feel
 - Branding
 - Document management
 - Content management
 - Records management
 - Office / client application integration
 - Administration and support
 - Backup and maintenance

SHAREPOINT 2010 KEY FEATURES

- **FAST search integration / Search integration with Windows 7**
 - Basic search now supports wildcard searches and search suggestions!
- **Authentication models – Claims based authentication**
 - Secure Store ID replaces SSO!
- **Cross site collection content types and metadata**
 - HUGE bonus for earlier 2007 search limitations!
- **New social networking features**
 - Including social tagging and content ratings
 - Enhanced My Sites and new organizational viewer
- **Fluent user interface**
 - RIBBON and Wiki pages
 - Easy and accessible in-browser editing tools
- **In-place Records Management and multi-step policy management**

KEY FEATURES (CONTINUED)

- **Enhanced Excel Services**
 - Integrates with Excel 2007 / better with 2010 plus Sparkline charts
 - Take advantage of the new Power Pivot features in Excel 2010/Excel Services – handles millions of rows of data
- **Access Services, Visio Services, InfoPath Forms Services (enhanced), Word Services**
- **External Content types and Lists (BCS / aka BDC)**
 - Codeless integration with backend systems
- **Powerful CODELESS workflows**
 - Build InfoPath list forms for enhanced form management and usability
- **PowerShell commands**
 - STSADM command line tool still exists
- **SANDBOXED Solutions**
 - Real testing!
 - User solutions at site collection level
- **XSLT List Views – XSLT everywhere**
 - CAML is still there too
- **Custom HELP files**
 - create your own online SharePoint HELP!
- **New Theming engine – use PowerPoint 2007 or 2010 theme files!**

PAGE EDITING AND NAVIGATION

- In-place page editing – pre-existing styles (customizable)
- WCAG 2.0 AA and XHTML 1.0 Strict compliant
 - Tables have NOT completely gone
 - InfoPath list forms and Data Form Web Parts still use Tables!
 - Meets US Section 508
- Fluid page layouts
 - WIKI everywhere
 - Control styles for consistent look and feel
- Flexible navigation controllable via Web interface
 - Dynamic left-hand and top-level navigation links
 - Metadata-driven navigation using Site collection or site metadata tags
 - Additional level of view by filtering
- Video: Interface in 2010

CALENDAR OVERLAYS

- Similar concept to calendar 'rollups'
- Now able to add additional calendars onto an existing team site calendar
- Includes the ability to 'overlay' calendars from other sites within a site collection and calendars from Exchange server
- Video – Calendar Overlays

SEARCH

- Video: connecting SharePoint search to Windows 7

UNCHANGED SINCE SHAREPOINT 2007

- OR little change since SharePoint 2007...
- Basic search (but now supports wild card search OOB)
- Content management
 - Publishing workflows
 - Publishing pages
 - Page layouts
- Document management
 - Same basic tiers of versioning and check-in / check-out
- Lists and Libraries - core functionality
- Site Templates - some remain and others are deprecated
- Master pages - though leverages ASP.NET 3.5 in 2010
- CSS - though more CSS files

WHAT YOU WILL NEED TO DEPLOY SHAREPOINT 2010: SERVERS

- SQL Server
 - SQL 2008 R2 or SQL 2008 + SP1+CU2 (or greater)
 - SQL 2005 with SP3 (supported though not recommended)
 - SQL 2008 R2 injects Power Pivot functionality into SharePoint
- Windows Server 2008 Standard with SP2 or greater 64BIT
 - WCF Hotfix (not part of the pre-requisite installer)
- Minimum 8GB RAM on production servers (can run with less RAM on developer servers)

- Can I install SharePoint 2010 on Windows 7?
 - Yes, but on Windows 7 x64 bit
 - You will need to adjust the compatibility settings in order for the installer to run
 - ONLY recommended for local development, i.e. not suitable for hosting SharePoint in production scenarios
- Feedback from Nicholas Rayner on his experience installing 2010 on Windows 7

WHAT YOU WILL NEED TO DEPLOY SHAREPOINT 2010: CLIENTS

- **Based on Office 2010 Professional Plus**

- **Outlook 2010**
 - For integration with External Content Types, i.e. associate with Contacts in Outlook 2010
- **InfoPath Designer 2010**
 - For creation of custom InfoPath list forms in SharePoint Server 2010
- **Excel 2010**
 - Power Pivot
 - Spark lines
- **Word 2010**
 - SharePoint 2010 content type templates accessibility in backstage

- **What version of Visio 2010 will I need to develop and work with SharePoint workflows?**
 - You will require Visio Premium 2010 for SharePoint workflows
 - You will also need to provide the account using Visio with elevated privileges
 - Visio 2010 is a separate download to Office Professional 2010!

WHAT YOU WILL NEED TO DEPLOY SHAREPOINT 2010: DEVELOP & DESIGN

- **Visual Studio 2010**
 - List templates
 - Deployment tools – including Sandbox option!
 - Import WSP (site template) files
 - Import SharePoint Designer workflow files
- **SharePoint Designer 2010**
 - Cannot use SharePoint Designer 2010 to edit SharePoint 2007 sites!
 - Cannot use SharePoint Designer 2007 to edit SharePoint 2010 sites

LICENSING!

- **SharePoint 2010 comes in Three flavours:**
 - **SharePoint Foundation 2010 (AKA Windows SharePoint Services 3.0)**
 - Included as part of Windows Server 2008
 - SQL Express limitations, 4GB storage
 - SQL Express (Advanced Services) with **SQL 2008 R2 - 10GB**
 - **SharePoint Server 2010 Standard**
 - **SharePoint Server 2010 Enterprise (InfoPath Services, Visio Services, etc.)**
- **Main changes between SharePoint 2007 and SharePoint 2010 is around internet facing sites**
 - **With SharePoint 2007 internet facing sites, you needed to purchase an internet connector license for non-employees which was licensed at Enterprise level only, i.e. no Standard connector.**
- **No pricing yet available**
- **Important – IF upgrading then must upgrade from same version to equivalent version!**



Microsoft® SharePoint® 2010

INTRANET

INTERNET

 Microsoft®
SharePoint Foundation 2010

 Microsoft®
SharePoint Server 2010

 Microsoft®
FAST Search Server 2010
for SharePoint

ON PREMISE

 Microsoft®
SharePoint Server 2010
for Internet Sites, Standard Edition

 Microsoft®
SharePoint Server 2010
for Internet Sites, Enterprise Edition

 Microsoft®
FAST Search Server 2010
for Internet Business

 Microsoft®
SharePoint Online

CLOUD

 Microsoft®
SharePoint Online
for Internet Sites

CLIENT ACCESS LICENSES:
Standard (Core), Enterprise

KEY UPGRADE CONSIDERATIONS

- To Upgrade now or wait
- ***NO*** supported upgrade paths from Beta 2 or Release Candidate to the RTM!
- Degree of existing SharePoint 2007 customization
- Number of open source and/or 3rd party tools deployed
- Client-side add-ons
- Client-side applications, i.e. Office
 - Value-add if moving to Office 2010, i.e. InfoPath Designer 2010, Visio Premium 2010 for SharePoint 2010 workflows, Word 2010 integrates well with SharePoint 2010 content type 'templates', Excel 2010 includes additional features like Spark lines and options for Power Pivot, External Content Types only integrate with Outlook 2010!
- Current security protocols in use
 - SSO?
 - Kerberos
 - NTLM

MOVING FORWARD: UPGRADE PREP

- **MUST** be running SharePoint Server 2007 SP2 + October 2009 CU or greater
- Run the pre-upgrade check
 - Included in the SharePoint Server 2007 SP2 + October CU updates the pre-upgrade check STSADM command
- Backup and document all existing customizations
- Perform special backups of existing content databases
- Establish a test environment
 - Mirror your existing production environment
 - TEST TEST TEST
- Review any existing 3rd party tools currently in use and check with vendors about upgrade plans
 - This could seriously impact the timing around when you upgrade!!
- Which upgrade path works best for you?

UPGRADE PATHS

- In-place upgrade
 - Use existing hardware
 - Farm will be offline during upgrade process
 - (most) Customizations will be available post-upgrade
 - Farm-wide settings preserved
 - This approach is recommended for small or non-productive environments
 - There is no rollback when using an in-place upgrade – no ‘un-do’ button
 - Requires a solid DR strategy
 - Other reasons for in-place upgrade include where you want to upgrade existing SharePoint site templates, i.e. deprecated STP template format and upgrade to new 2010 WSP format

UPGRADE PATHS (CONTINUED)

- Database attach upgrade
 - Detach existing 2007 databases and attach to a new 2010 farm
 - No existing (2007) server farm settings will be maintained
 - Requires existing settings to be documented and recreated in new environment
 - This approach is recommended where farm level configurations are minimal!
 - A prime example is where you have 100's of SharePoint audiences configured in your current 2007 farm and lots of content targets associated with those audiences. Those audiences and targets will need to be recreated on the destination 2010 farm.

POST-UPGRADE MAINTENANCE

- Visual upgrade – initially the SharePoint 2007 look and feel will remain until you choose to switch to the 2010 UI - gradual upgrade
- Some assemblies may need to be recompiled
- Timer jobs for any custom workflows may need to be recompiled
- Check any pre-existing site templates, i.e. the STP format is deprecated in 2010 and replaced by WSP format
- Check any custom themes – 2007 themes are deprecated in 2010 though 2007 themes are installed on 2010 WFE for legacy purposes
 - Won't work once you switch the UI to 2010 look and feel
- Any existing queries which query greater than 5000 items will fail and you will need to modify those queries
- 3rd party upgrades – check with vendors

MOVING FORWARD: PLAN OF ATTACK

- Infrastructure – server and OS levels
- People – get key stakeholders involved
- Training – identify levels of training, i.e. developer if in-house development
- Add-ons – carry any existing add-ons over or add new ones
- Support – in-house or outsourced / training
- Hosted or On Premise
 - SharePoint Online (licensing)
 - Costs for hosting
 - Customizations allowed by host – SPD, DLLs, Custom Web Parts
 - On Premise costs
 - IT Support
 - Service Packs
- Development – in-house or outsource
- Design – in-house or outsource

Q&A

AUSTRALIA SHAREPOINT CONFERENCE

- 16th and 17th June, 2010, The Hilton Hotel, Sydney, Australia
- Keynote delivered by Microsoft's SharePoint Product Director, Arpan Shah
- Local and international speakers
- Sessions include business, vendor, voice of the customer, case studies and technical
- ***FREE*** hosted SharePoint SERVER 2010 site for all attendees
- Australian SharePoint User Group booth for Q&A and demonstrations
- www.sharepointconference.com.au



SHAREPOINT DESIGNER 2010 UNLEASHED

- Due out September 2010
- Covers introduction to SharePoint 2010 and SharePoint Designer 2010, Web design, Business intelligence and Workflows
- Comprehensive how-tos
- Online resources
- Ongoing online author forums and errata
- http://www.amazon.com/SharePoint-Designer-Unleashed-Kathy-Hughes/dp/0672331055/ref=sr_1_15?ie=UTF8&s=books&qid=1272489690&sr=1-15
- Demo: Preview of Final ToC

